

THE HARDWOOD ECOSYSTEM EXPERIMENT

OBJECTIVES AND EARLY RESPONSES TO TREATMENT

INDIANA DEPARTMENT OF NATURAL RESOURCES
FOREST STEWARDSHIP COORDINATING COMMITTEE MEETING

MARTINSVILLE, INDIANA

24 SEPTEMBER 2013

Andy Meier, Project Coordinator



HEE



Hardwood Ecosystem Experiment

1. Project background
2. Experimental design
3. Initial results
4. Future directions

Outline

HEE Background

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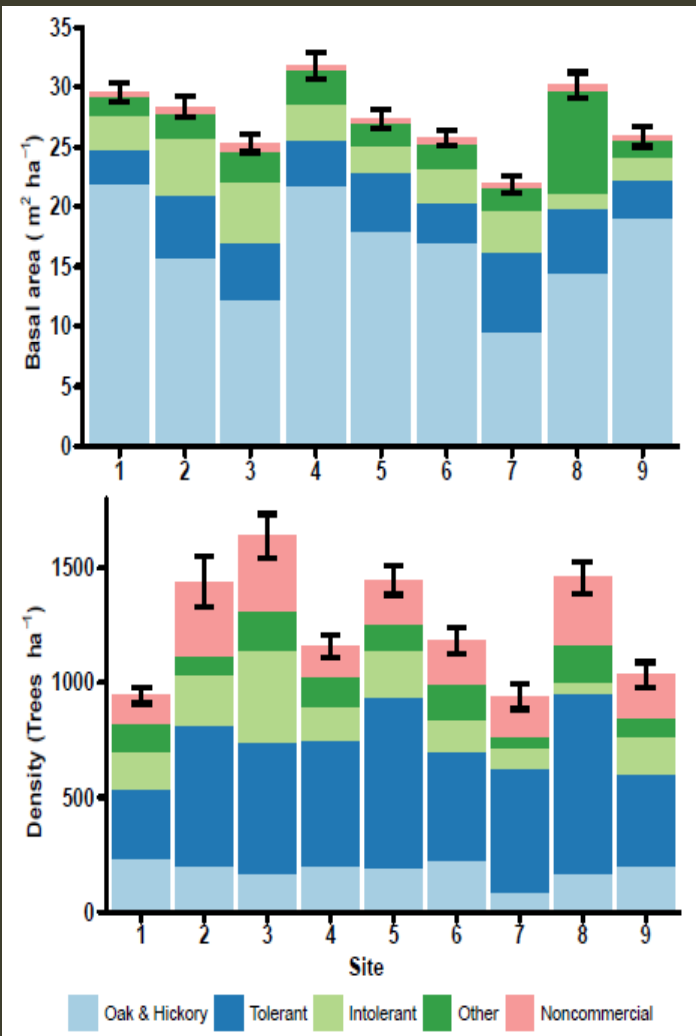
R. Kalb

- For the past few decades, there has been growing concern about the regeneration of oak-dominated forests in Indiana



HEE Background

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- Overstory dominated by oaks and hickories
- Pole and regeneration layers dominated by shade tolerants, mainly American beech, sugar maple and red maple



Source: Saunders and Arsenault 2013

HEE Background

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But . . .

- Forest management in Indiana has not generally been successful in regenerating oak on the best sites
- Public support for intensive silviculture on public lands is often lacking
- Little local data was available on the impact of management alternatives on other ecosystem functions



R. Kalb

So . . .

- The Hardwood Ecosystem Experiment (HEE) was initiated in 2006 with four main objectives:



B. MacGowan

HEE Objectives

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1. Develop silvicultural systems that maintain oak dominated forests
2. Determine the impacts of these systems of ecological communities
3. Determine the impacts of these systems on human communities
4. Develop tools to engage the public regarding forest management and ecosystem health



Source: Kalb and Mycroft 2013

R. Kalb





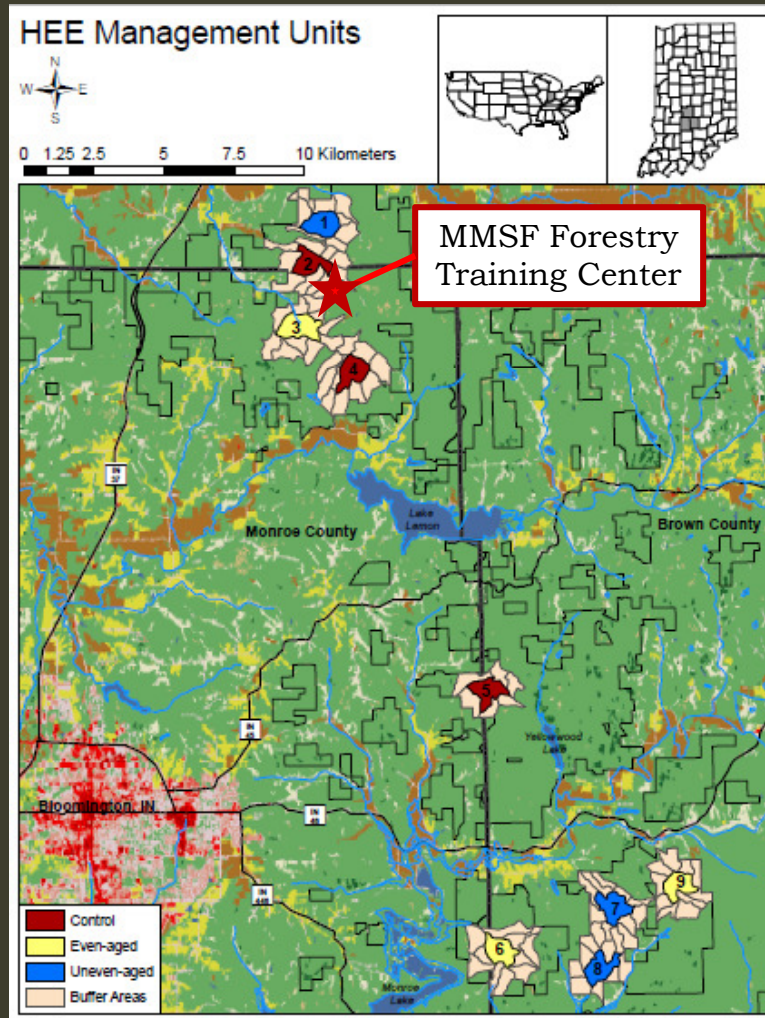
HEE



**Hardwood
Ecosystem
Experiment**

Study sites

8



Source: Kalb and Mycroft 2013

- Nine study sites on Morgan-Monroe and Yellowwood State Forests
 - Each unit includes a research core (190-270 ac) and buffer area (540-975 ac)
 - 20 miles between northernmost and southernmost units



A. Meier

Treatment schedule

9

- 2006
 - ▣ Baseline data collection begins
- 2008-09
 - ▣ First harvest cycle
- 2028
 - ▣ Next scheduled harvest cycle
 - ▣ Every 20 years until 2108



HEE



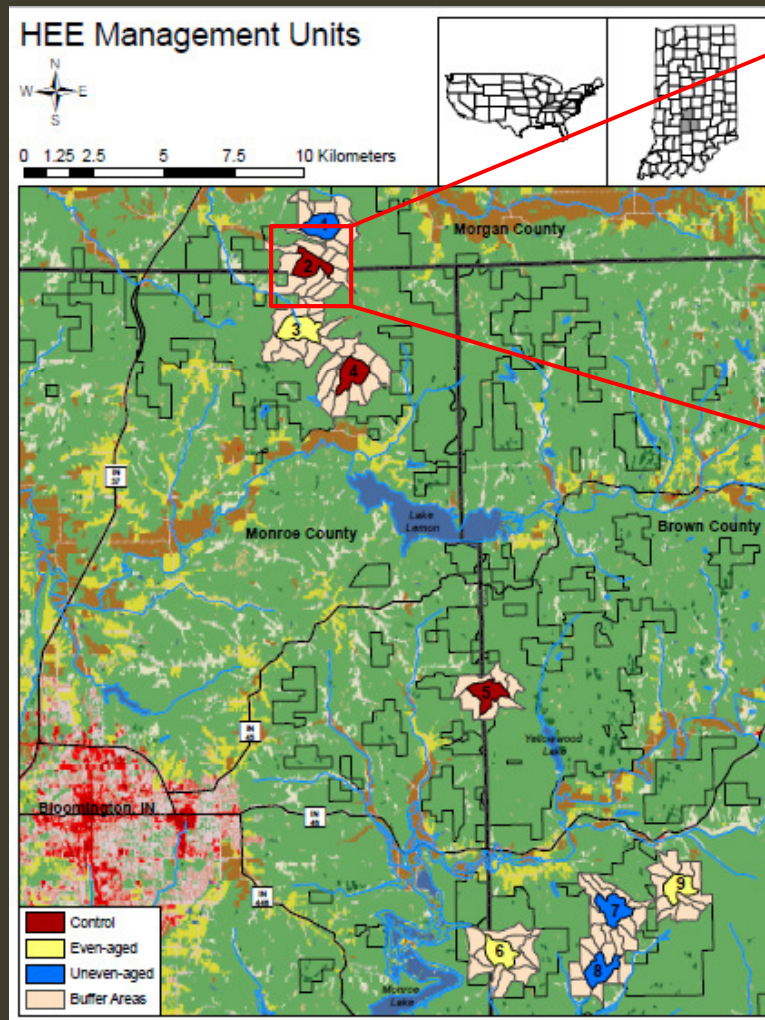
**Hardwood
Ecosystem
Experiment**



HEE Treatments

Control units

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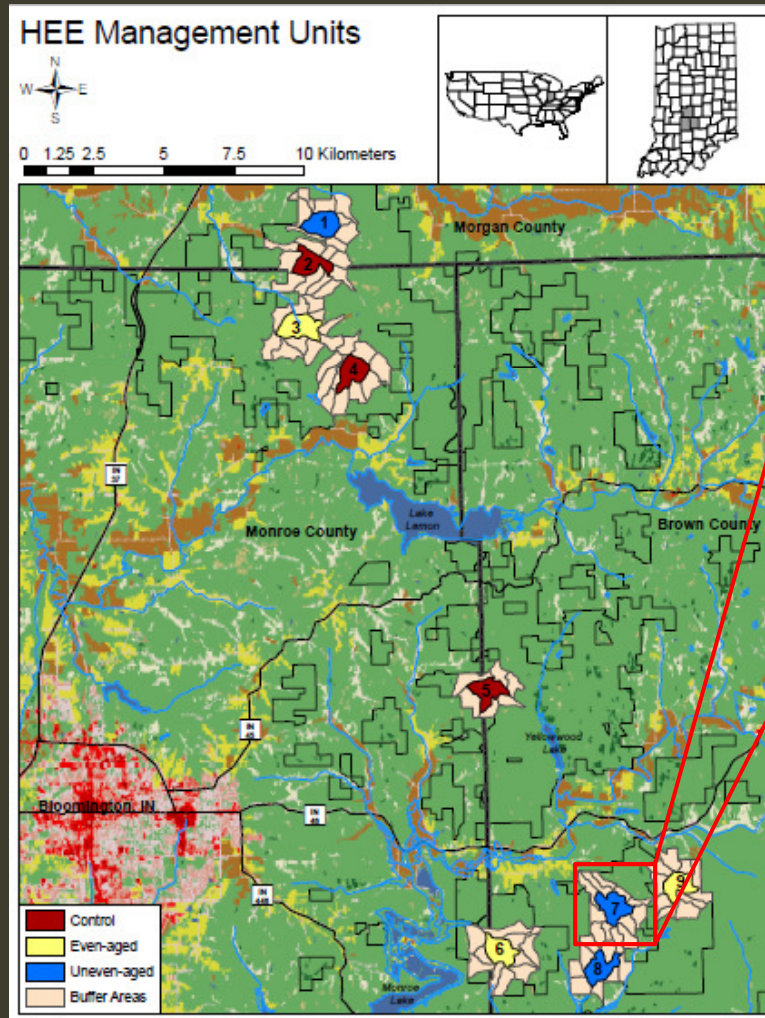


□ No harvesting

Source: Kalb and Mycroft 2013

Uneven-aged units

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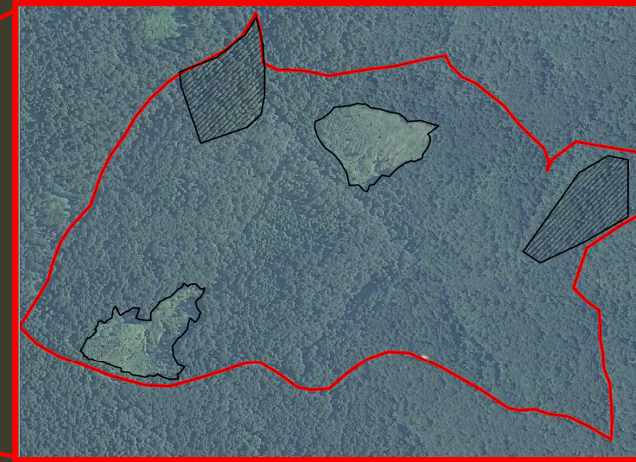
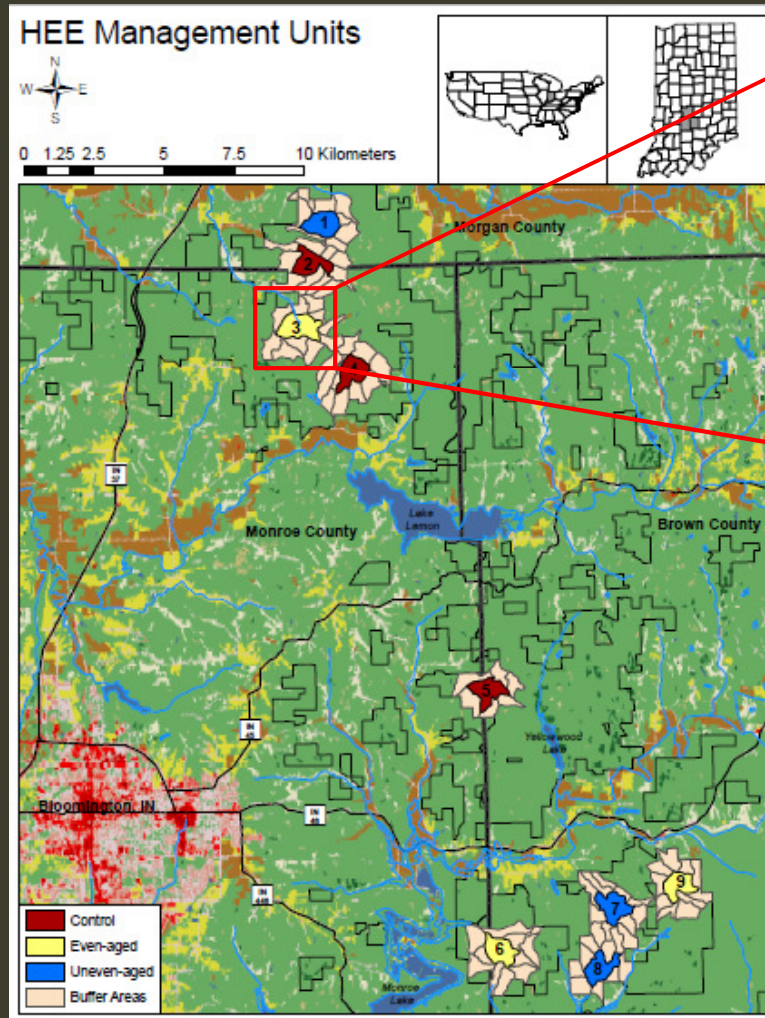


- Two each of 5 and 3 ac patch cuts (1st cycle only)
- Four 1 ac patch cuts (1st cycle only)
- Single tree-selection in matrix (all cycles)

Source: Kalb and Mycroft 2013

Even-aged units

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- Two clearcuts and two shelterwoods 8-10 ac each per treatment cycle
- Matrix unmanaged until next round of treatments

Source: Kalb and Mycroft 2013

Single-tree selection, MMSF

2008 (Pre-harvest)



Spring 2009



Spring 2011



Spring 2013



3-ac patch cut, MMSF

2008 (Pre-harvest)



Spring 2009



Spring 2011



Spring 2013



10-ac clearcut, MMSF

2008
(Pre-harvest)



Spring 2009



Spring 2011



Spring 2013





HEE



**Hardwood
Ecosystem
Experiment**

Stand Level Studies

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	Start Date	Inventories completed
<u>Woodland Salamanders</u>	2007	6
Bats	2006	7
Wood-boring Beetles	2006	6
Oak Mast Dynamics	2006	7
Small Mammals	2007	6
Deer exclosures	2010	2+



Landscape Level Studies

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	Start Date	Inventories completed
<u>Breeding Birds</u>	2006	7
Cerulean Warblers	2007	6
Timber Rattlesnakes	2007	5
Eastern Box Turtles	2007	4
Owls	2009	4
<u>Vegetation</u>	2008	1.5
Social Science	2007	2

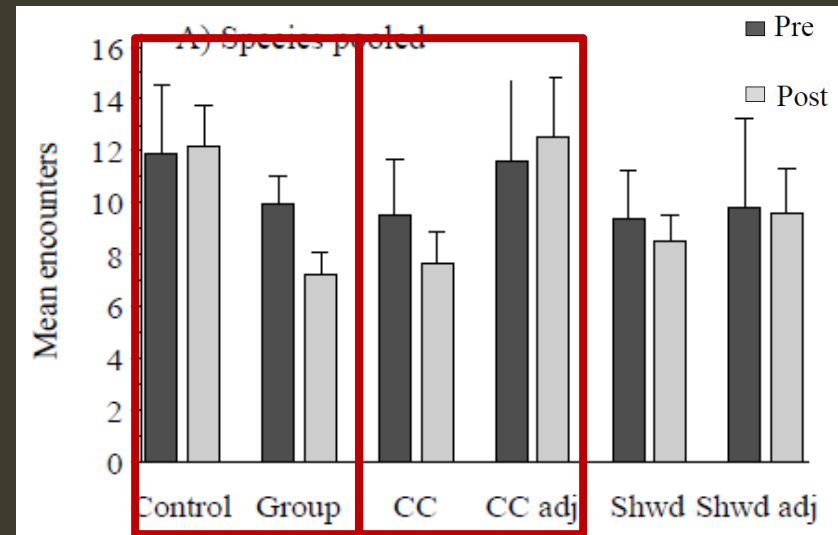


Salamanders

20

R. N. Williams, R.N. Chapman, Purdue University

- Clearcuts had significantly fewer encounters than areas adjacent to the clearcuts
- Patch cuts had significantly fewer encounters than controls
- Slope and temperature also significant factors
- Clearcuts and patch cuts still appear to have fewer salamanders



B. Kalb

Bats

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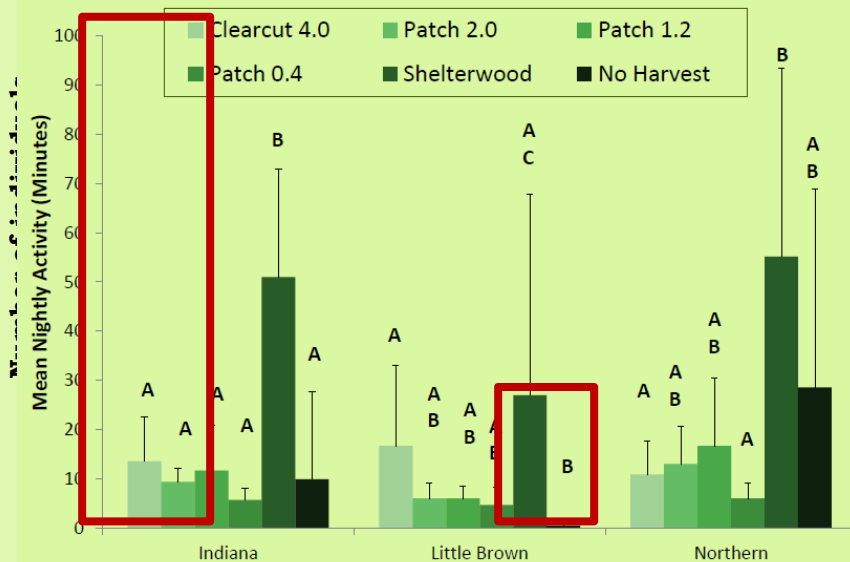
J. O'Keefe, Indiana State University and T. Carter, Ball State University



T. Carter, Ball State University

Studies

- Acoustics, mist-netting and radio-telemetry
- Northern long-eared bat (MYSE) most common on HEE sites
- Endangered Indiana bat (MYSO) present but uncommon
- Bat activity varies in response to treatment depending on species
- No radio-telemetry data yet, but provide invaluable data on northern long-eared bat habitat needs

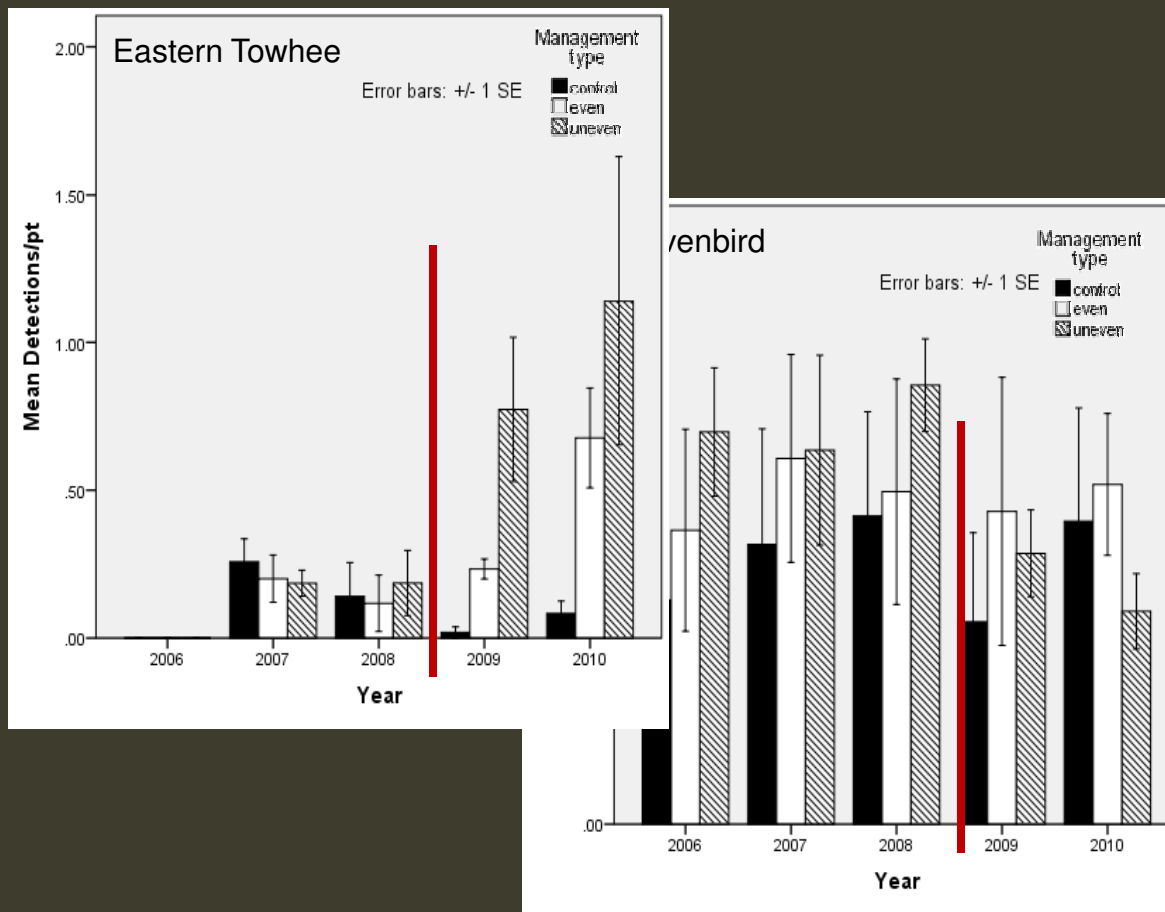


Source: Short et al 2013, HED Annual Reports 2010-13
 Source: Norr and Dechamps 2013

Breeding birds

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J. B. Dunning, Purdue University

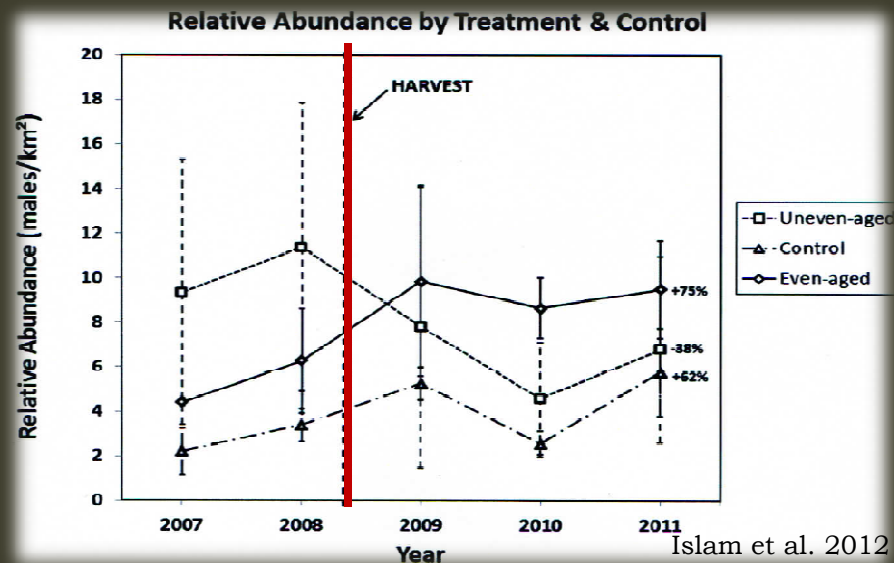


- Early-successional guild
 - All species except Brown-headed Cowbird increased in abundance
- Mature-forest guild
 - More variable response
 - Either positive or non-significant response
 - No significant negative effects

Cerulean Warblers

23

K. Islam, Ball State University



- Increased number of detections in even-aged and control units
- Decreased number of detections in uneven-aged units
- Nest success was highest in control units and lowest in uneven-aged units
- Territory size appears to be smaller near clearcuts



Source: Dibala 2012, Islam et al. 2012

Owls

24

R.K. Swihart and J.B. Dunning, Purdue University



Project design

- Citizen-science: almost all data is collected by volunteers
- Data analyzed for an undergraduate research project
- Manuscript currently in preparation written by undergraduate researchers



J. Moore

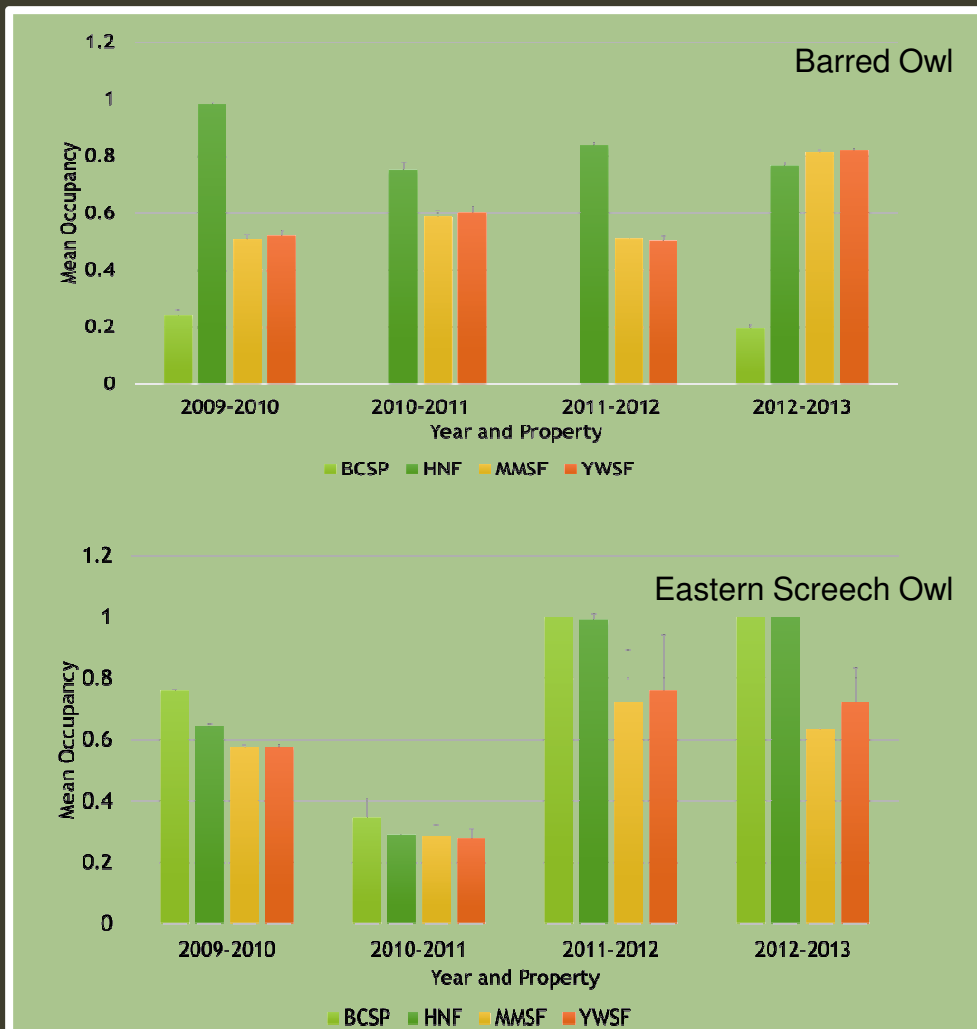


K. DeCosta

Owls

25

R.K. Swihart and J.B. Dunning, Purdue University



Source: Leonard et al., in prep

- No consistent responses across properties
- Low Barred Owl occupancy in Brown County State Park potentially a result of high human activity
- Eastern Screech Owl had a higher rate of occupancy when Barred Owls had lower rates
- But, how does this change over time?

Additional HEE Studies

26

Start Date

Inventories completed

Owls

2009

4

Deer exclosures

2010

2+

Nightjar surveys

2009

2

Ruffed Grouse surveys

2009

2

Year-round bird surveys

2009

2

American Woodcock surveys

2012

1

Epicormic branching

2011

1

HEE Summary to Date

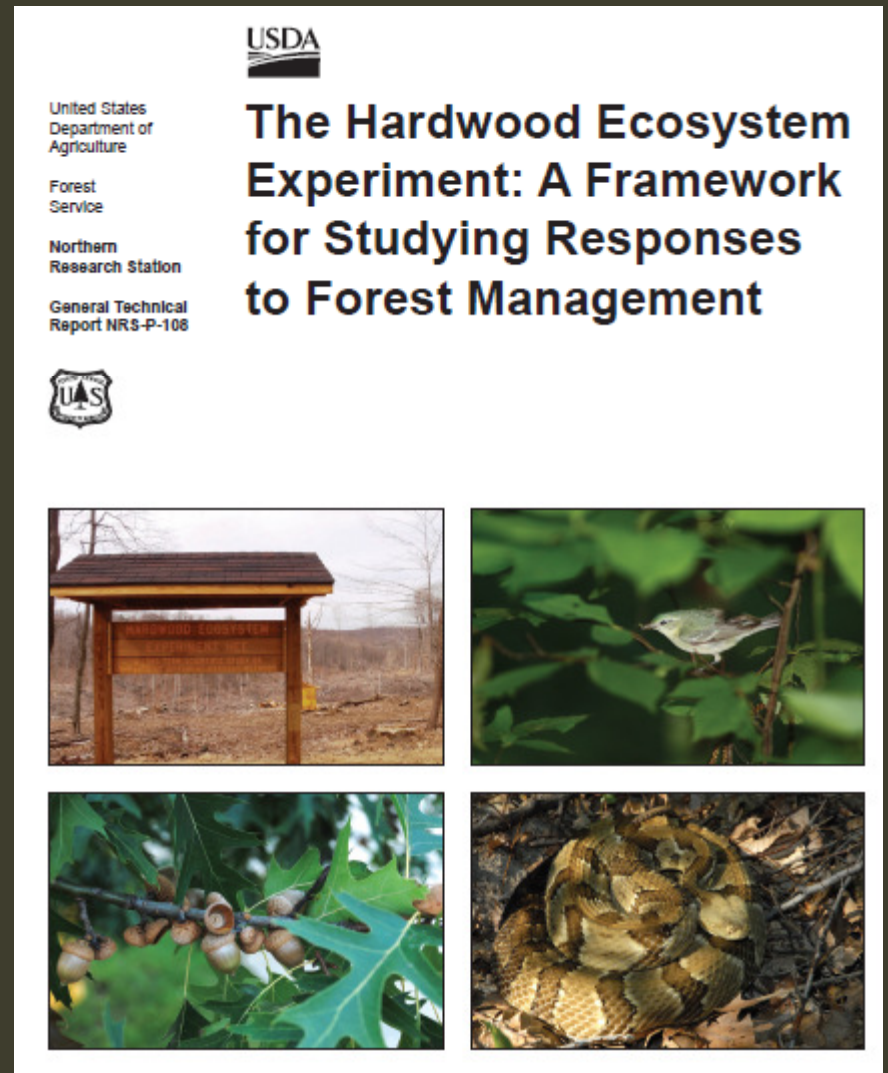
27

25 peer-reviewed journal publications in press or in print, 350 page US-Forest Service General Technical Report

Almost 20 principal investigators from 7 universities

22 graduate students have conducted graduate research on the HEE, more than 130 undergraduate and post-baccalaureate technicians and researchers

Over 75 presentations to diverse audiences, from school groups to scientific meetings



Future research directions

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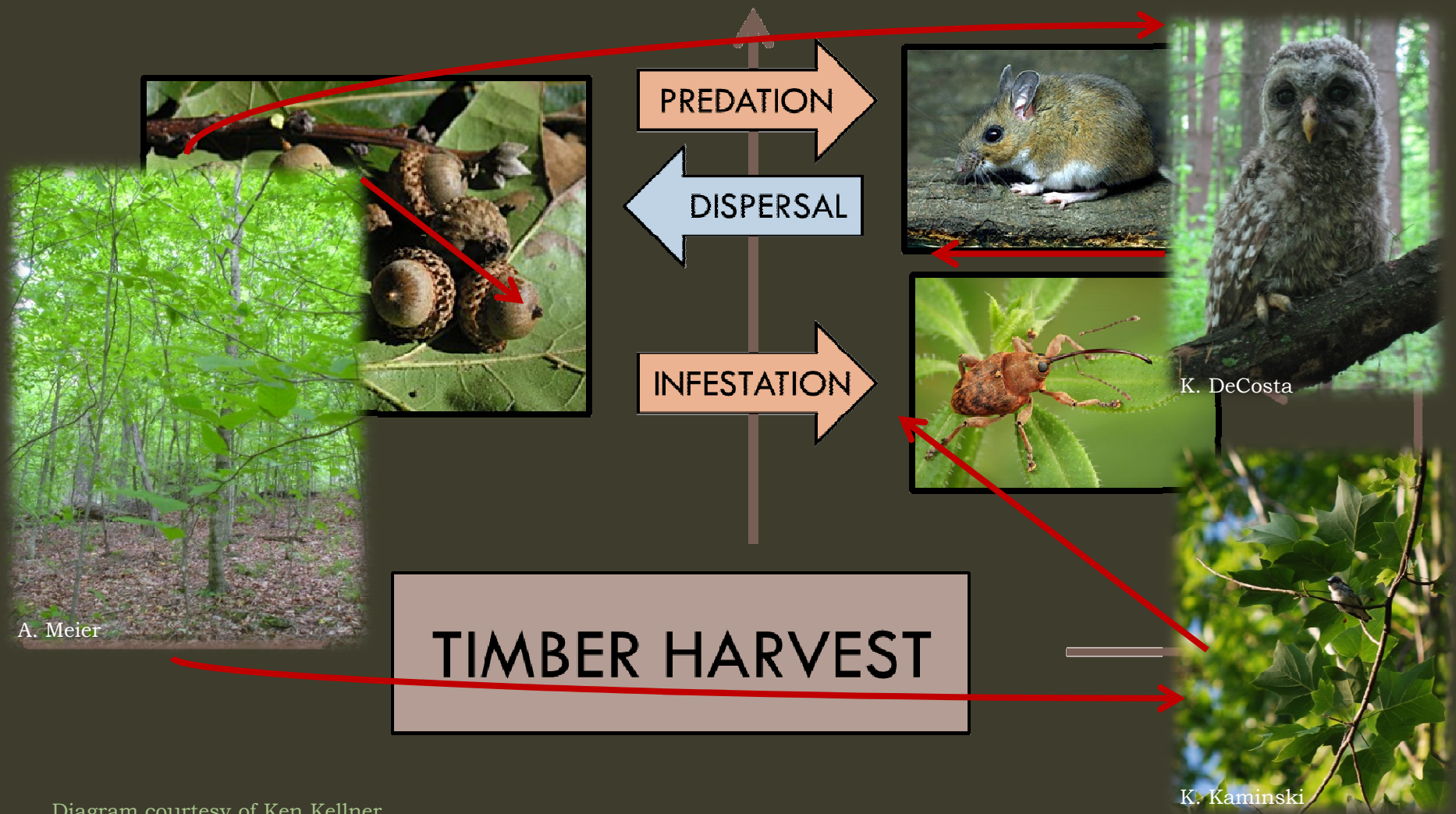
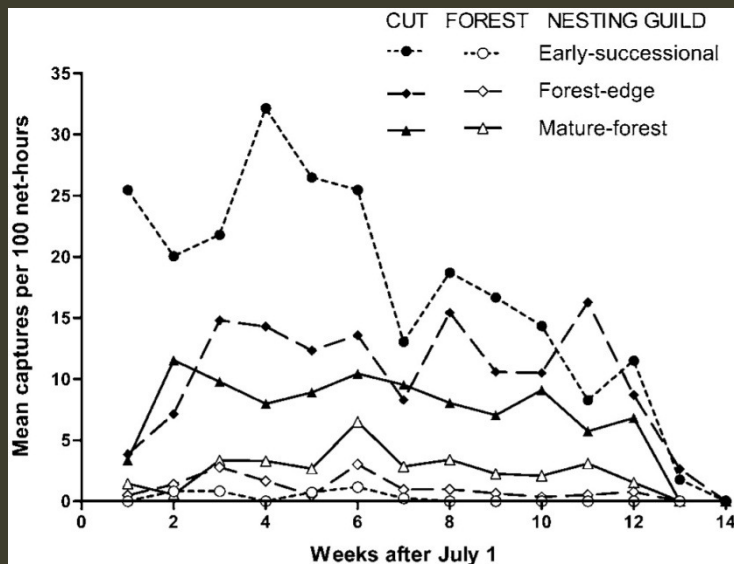
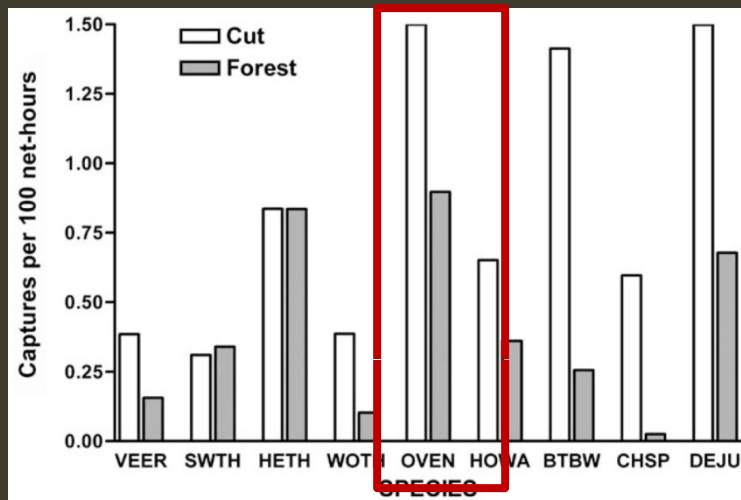


Diagram courtesy of Ken Kellner

Future research directions

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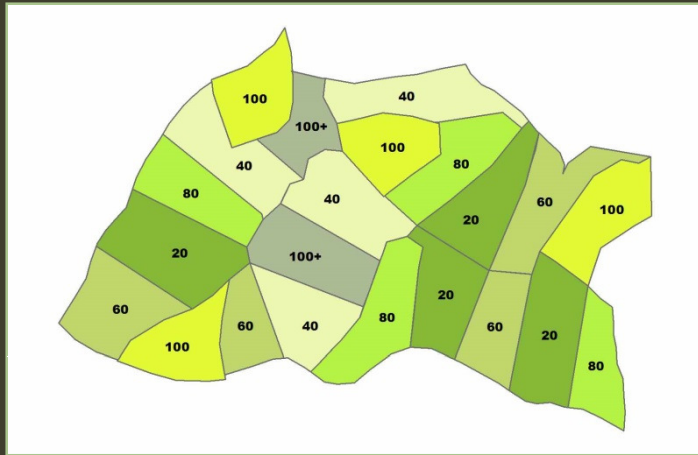
Presence vs. fitness

- We have seen changes in abundances of different species in response to forest management, but ...
- Do these changes reflect actual differences in the health of populations?
- How do these population responses change over time?

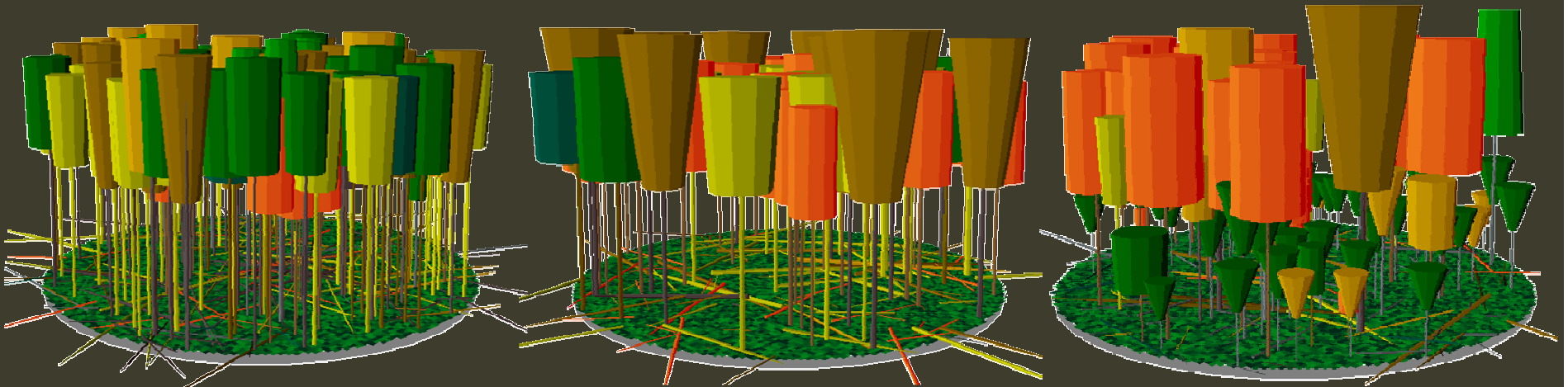
Source: Stoleson 2013

Stand Characteristics in 2100

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- In even-aged units, uniform mix of 0-100 year old stands and greatest component of intolerants
- In control units, 200+ year old trees with increasing rate of natural mortality
- In uneven-aged units, trees generally 0-100 years old with accelerated dominance by tolerants



Future research directions

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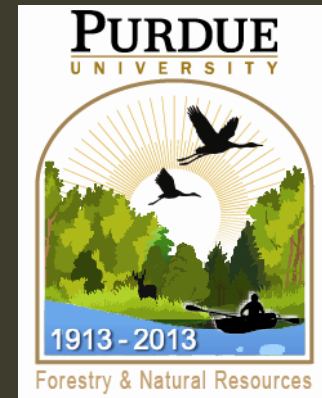


Development of advance oak regeneration

- We would like to see higher levels of oak seedling establishment and recruitment.
- We suspect that this is largely due to a low number of oak seedlings and saplings prior to harvest.
- What effect would multiple, low-intensity prescribed burns prior to treatment have on
 - Oak establishment?
 - Residual tree quality?
- Are even-aged treatments necessary for oak establishment?

HEE Partners

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Thank you!

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Volume 6, Issue 1
Spring/Summer 2013



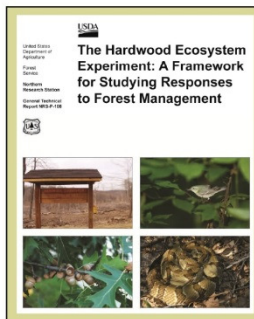
Hardwood Ecosystem Experiment

THE HEE UPDATE

<http://HEEForestStudy.org>
Andy Meier, Project Coordinator | 765-494-1472 | meiera@purdue.edu

HEE GENERAL TECHNICAL REPORT PUBLISHED

After many years of hard work, the Hardwood Ecosystem Experiment is proud to announce the release of "The Hardwood Ecosystem Experiment: A Framework for Studying Responses to Forest Management." This compendium of HEE data prior to timber harvesting in 2008-09 was published by the Northern Research Station of the USDA-



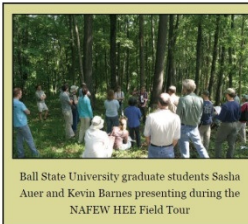
Forest Service as General Technical Report NRS-P-108. All manuscripts in the document were reviewed by at least two anonymous scientists prior to publication.

The entire document spans a total of 350 pages and includes 21 chapters describing baseline conditions on all of the HEE sites before the initiation of harvesting treatments. It is intended to be a reference for future researchers as well as a resource for the general public. The entire manuscript is available free of charge online at <http://www.nrs.fs.fed.us/pubs/42882>. No printed copies are available, but requests for CD-ROMs can also be made at this website.

North American Forest Ecology Workshop

The 9th North American Forest Ecology Workshop (NAFEW) was held in Bloomington, Indiana from June 16-20, 2013. Dr. Mike Saunders, Purdue University associate professor of silviculture and HEE Executive Committee member, was the chair for the workshop, so the HEE was a central component of the program. One full-day field tour of the HEE sites and nearby Brown County State Park was scheduled which was attended by more than 20 scientists and natural resource managers from across North America. In addition, a session of oral presentations titled "Long-term Experiments in Managed Central Hardwood Forests" was organized along with the Missouri Ozark Forest Ecosystem Project (MOFEP) to highlight findings from these two studies.

The workshop was well attended, well received, and provided many opportunities to showcase the valuable work being conducted on the HEE. Many thanks are due to the researchers who took the time to present for the workshop. See <http://nafew.org> for the workshop agenda.



- To receive the HEE update newsletter (published twice a year) either,
 - Sign your name and email or mailing address on the sheet I am circulating
 - Send me an email, meiera@purdue.edu with the subject "HEE newsletter" requesting to be added to the distribution list





HEE Background

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- The HEE was initiated in 2006 to address these issues



T. Carter



B. MacGowan



K. Kaminski

- Funding agency
 - Indiana Department of Natural Resources – Division of Forestry
- Location
 - Morgan-Monroe and Yellowwood State Forests in southern Indiana
 - Threatened and endangered species

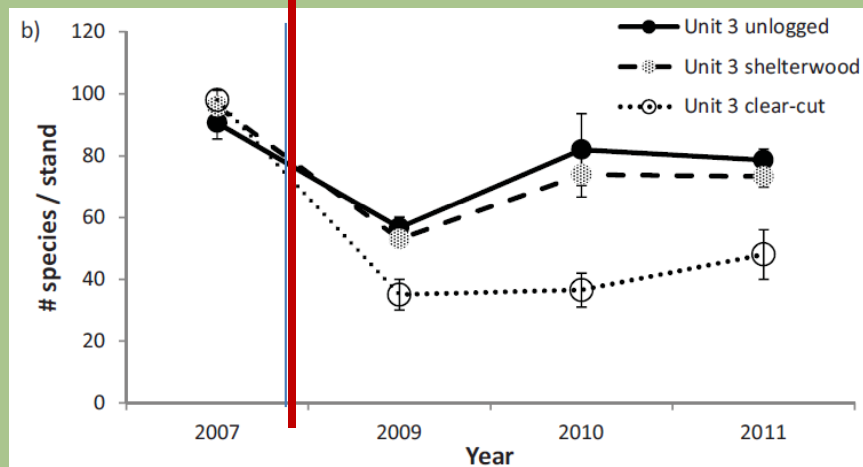


Lepidoptera

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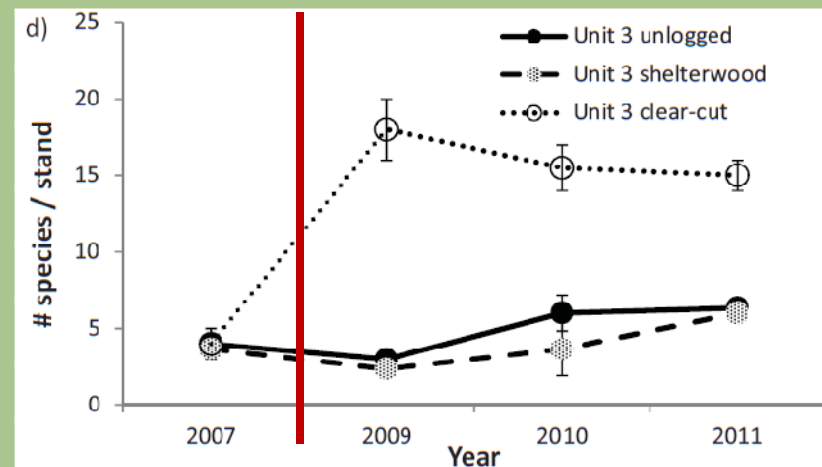
K. Summerville, Drake University

All species



- Overall decrease in species diversity in clearcuts
- Patch cut species diversity rebounding
- Total number of individuals shows same pattern

Herbaceous feeders

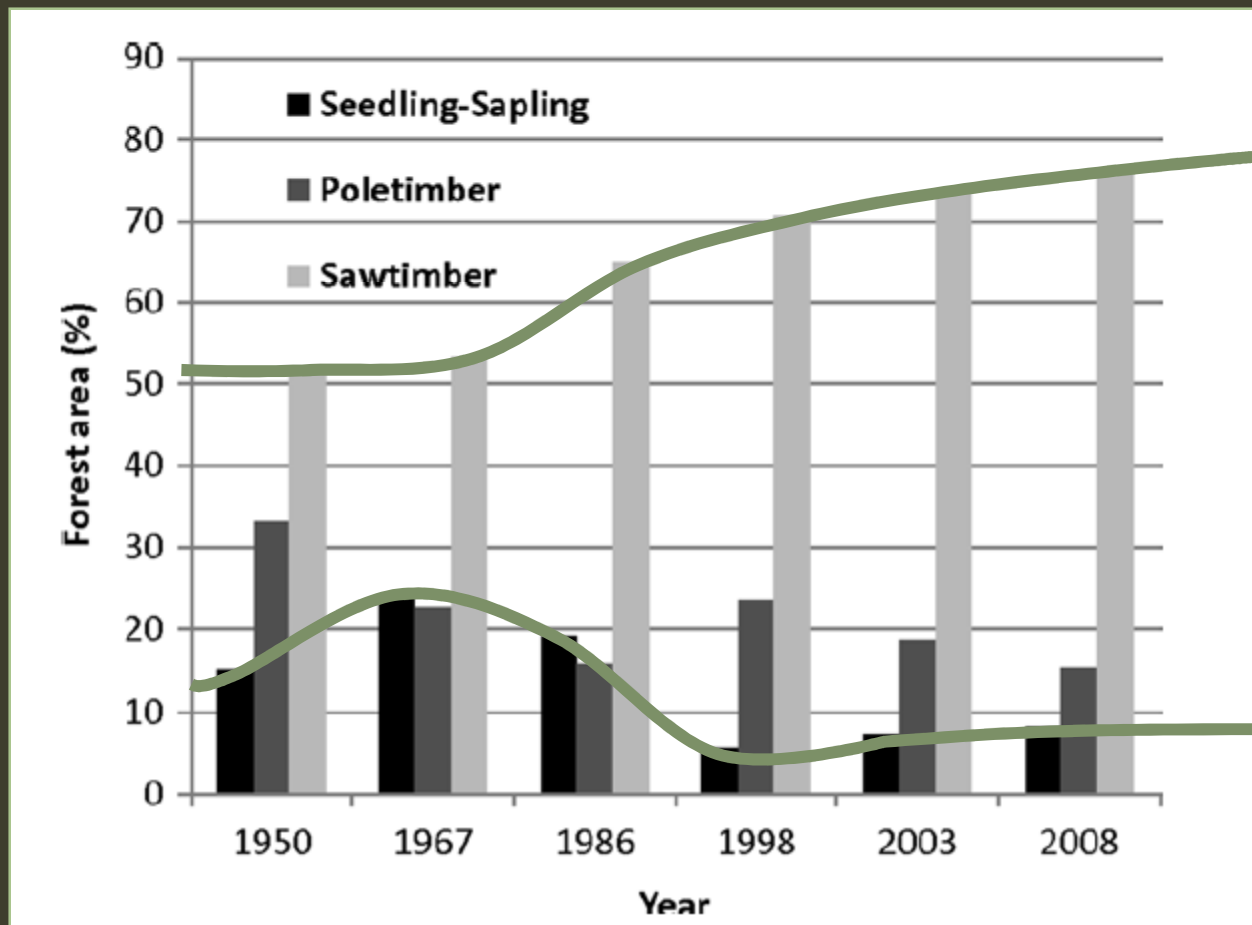


- Responses differ by functional traits
- Substantial increase in diversity of herbaceous feeders in clearcuts
- Pollinator diversity also higher in clearcuts

HEE Background

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□ Age structure of Central Hardwood Forests



Shifley and Thompson 2011



HEE Background

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- How do we regenerate oak-hickory ecosystems in Indiana?



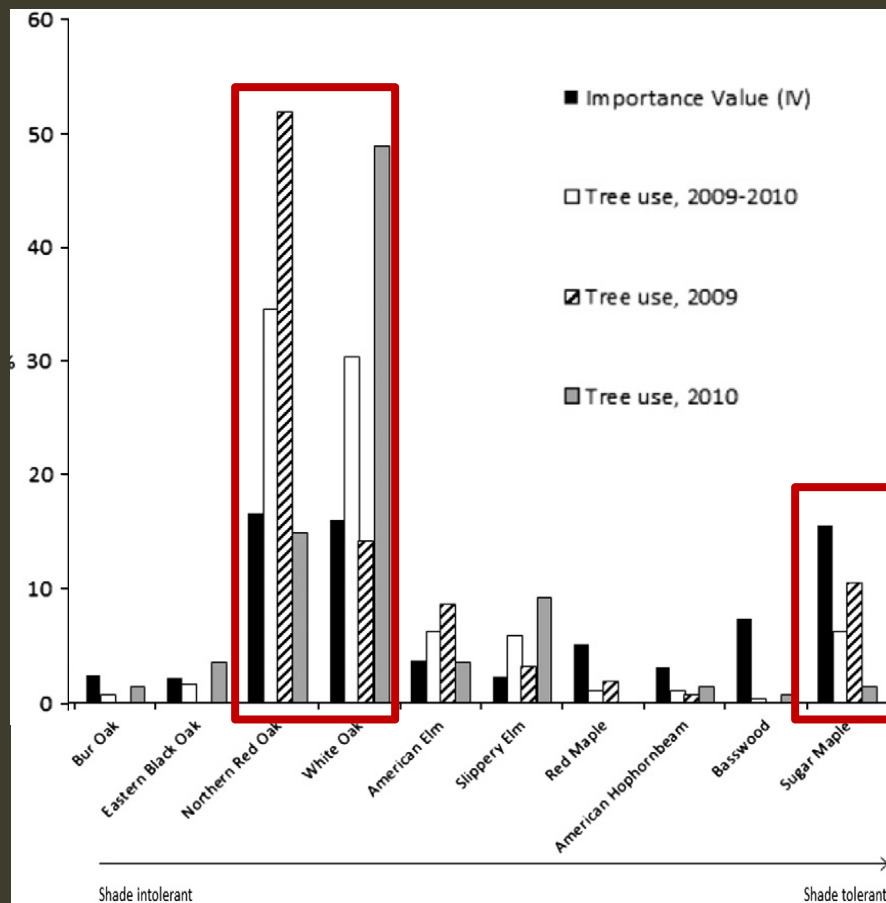
R. Kalb

- Context:
 - ▣ Altered disturbance regimes
 - ▣ Wildlife habitat

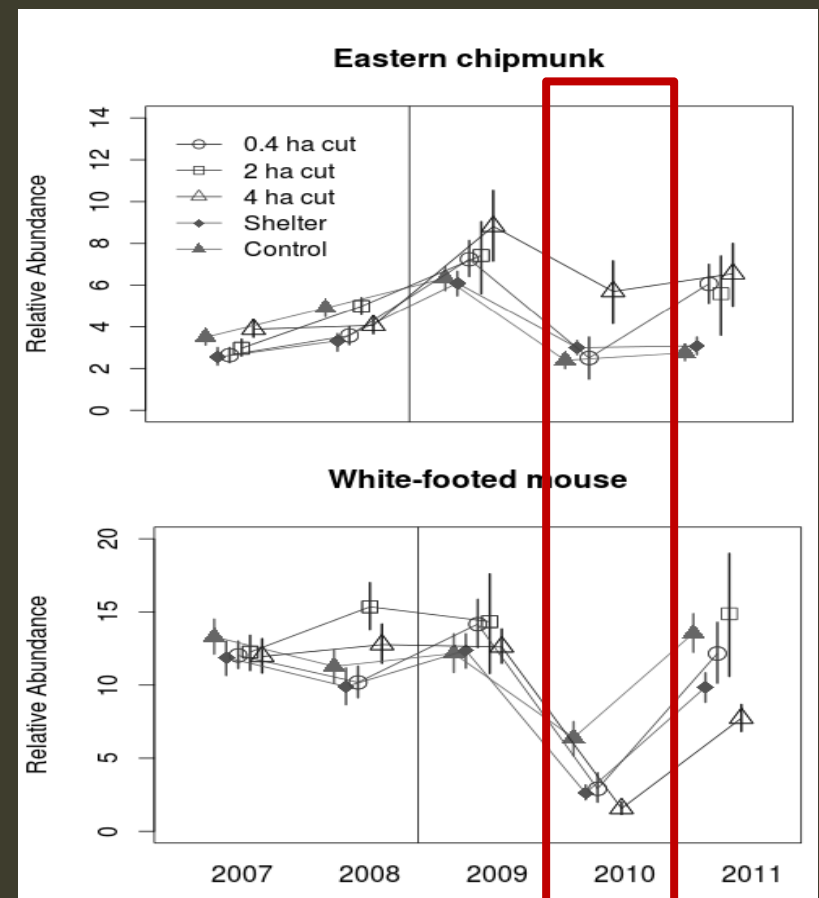


HEE Background

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Source: Wood et al. 2012



Source: Kellner et al. 2013

HEE Background

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- How do we regenerate oak-hickory ecosystems in Indiana?



R. Kalb

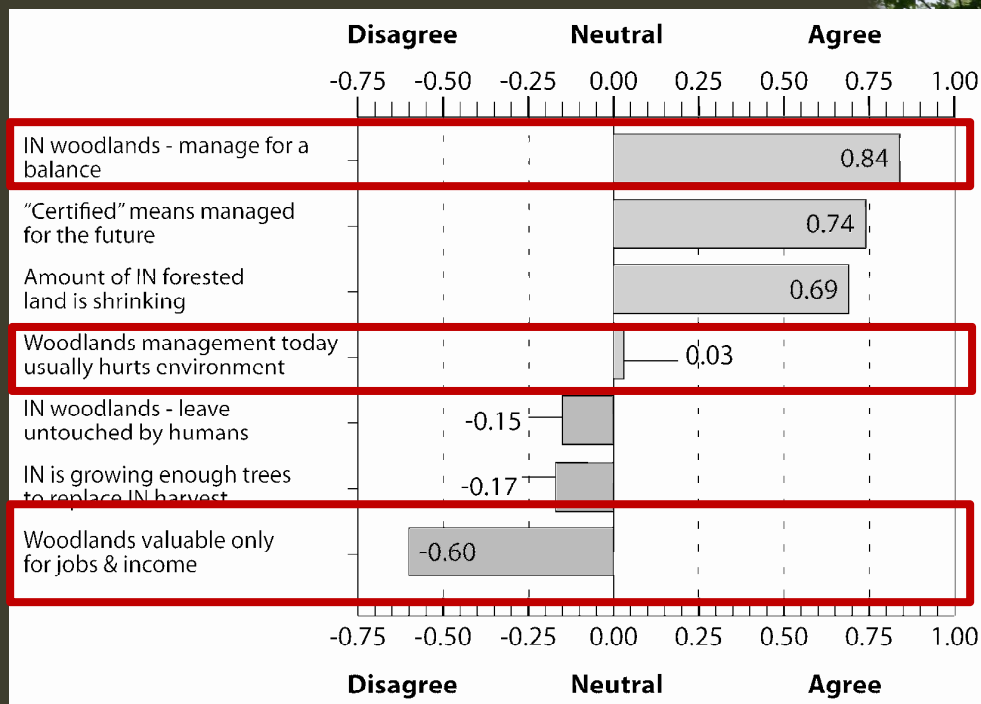
- Context:
 - ▣ Altered disturbance regimes
 - ▣ Wildlife habitat
 - ▣ Public perception of resource management



HEE Background

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□ Public perceptions of forest management



HEE Objectives

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- Develop even-aged and uneven-aged silvicultural systems that maintain oak dominated forest communities and landscapes



HEE Objectives

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- Determine both the positive and negative impacts of these systems on populations of herbaceous, avian, and terrestrial amphibian groups



A. Meier



R. Kalb



J. MacNeil



HEE Objectives

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- Determine the social and economic ramifications of these systems in both local and regional communities



D. Carlson



C. Mycroft



HEE Objectives

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- Provide demonstration sites and develop novel educational materials and techniques to engage the public concerning forest management



R. Kalb

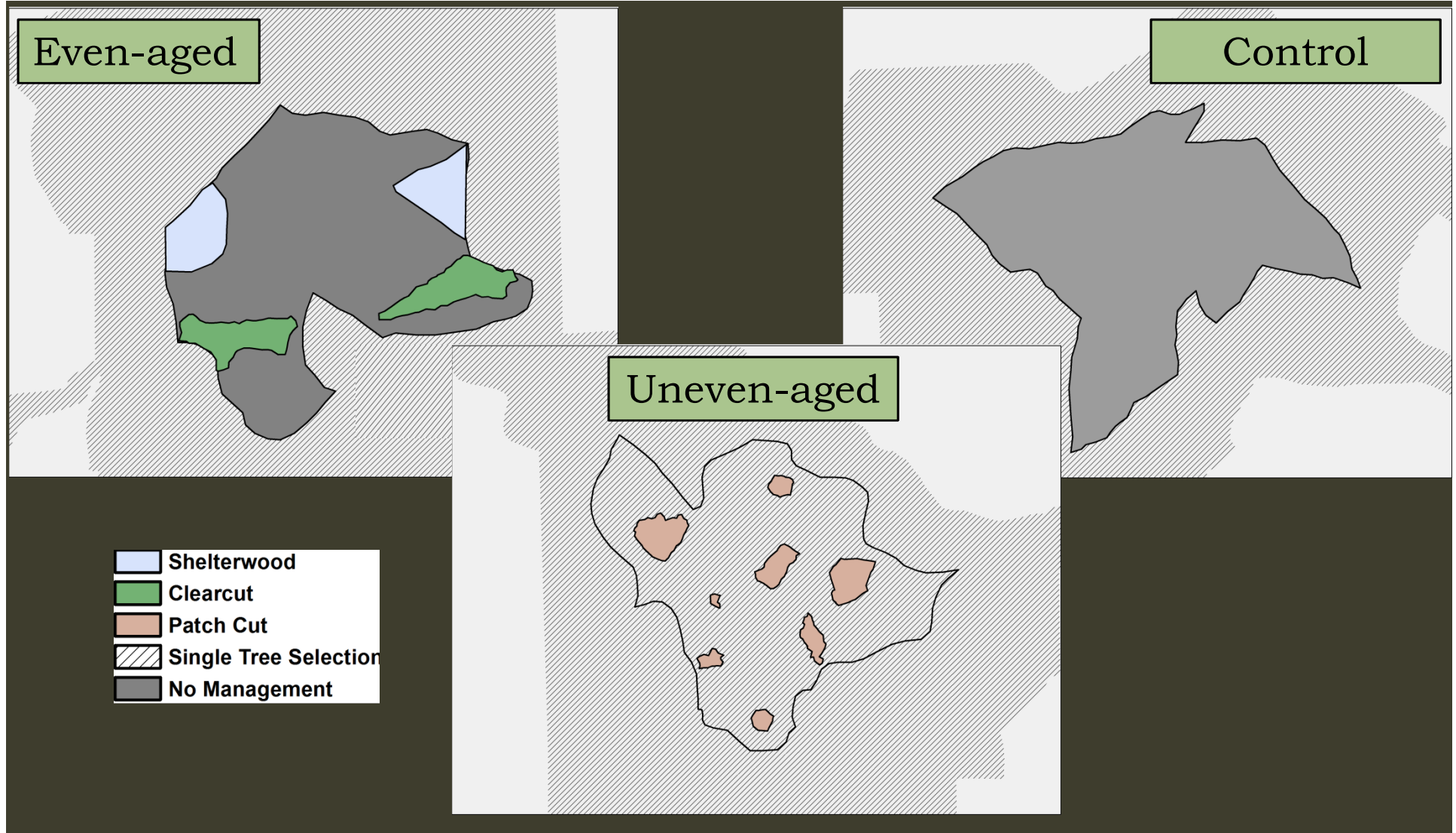


R. Kalb



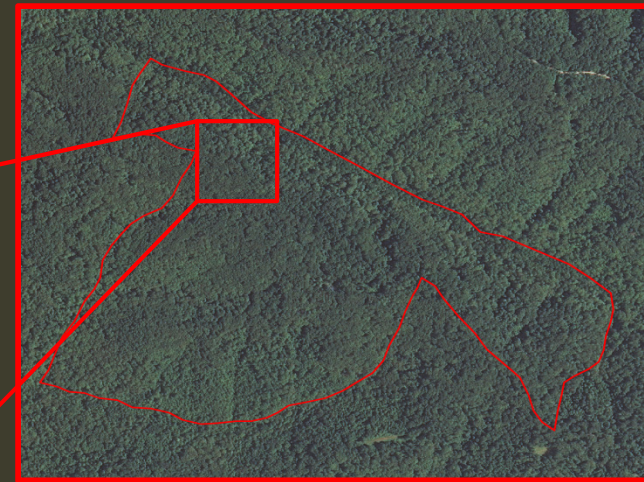
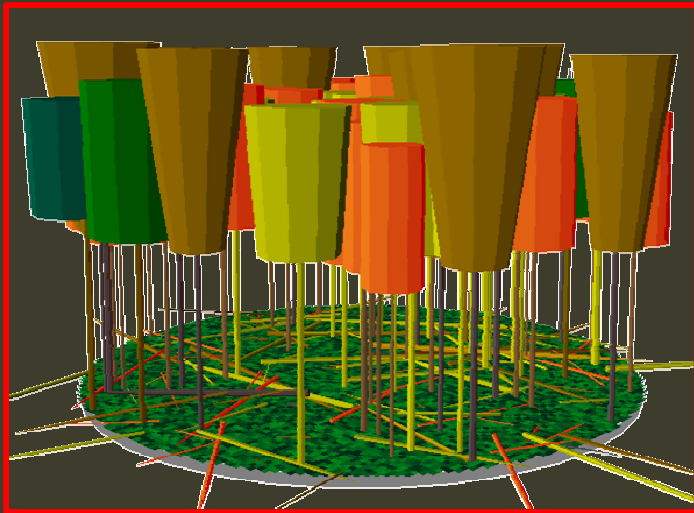
2008-09 Harvests

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Control units

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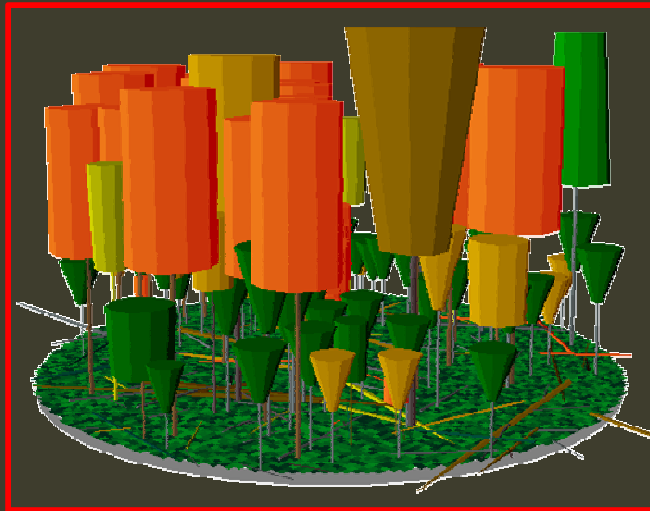


Structure and composition in 2100

- ❑ Mature forest beginning to experience overstory mortality
- ❑ Canopy dominated by 200+ year old oaks
- ❑ Strong maple-beech component in lower canopy

Uneven-aged units

49



Structure and composition in 2100

- 10 patches of 100 year old trees
- Matrix multi-aged
- Multiple strata in the canopy
- Accelerated transition to maple/beech dominance

Breeding birds

50

J. B. Dunning, Purdue University

Early-successional

Brown-headed Cowbird (*Molothrus ater*)
Carolina Wren (*Thryothorus ludovicianus*)
Indigo Bunting (*Passerina cyanea*)
Eastern Towhee (*Pipilo erythrophthalmus*)

Mature-forest

Acadian Flycatcher (*Empidonax virescens*)
Cerulean Warbler (*Setophaga cerulea*)
Ovenbird (*Seiurus aurocapilla*)
Red-eyed Vireo (*Vireo olivaceus*)
Scarlet Tanager (*Piranga olivacea*)
Worm-eating Warbler (*Helmitheros vermivorum*)
Wood Thrush (*Hylocichla mustelina*)



Stand: Bats

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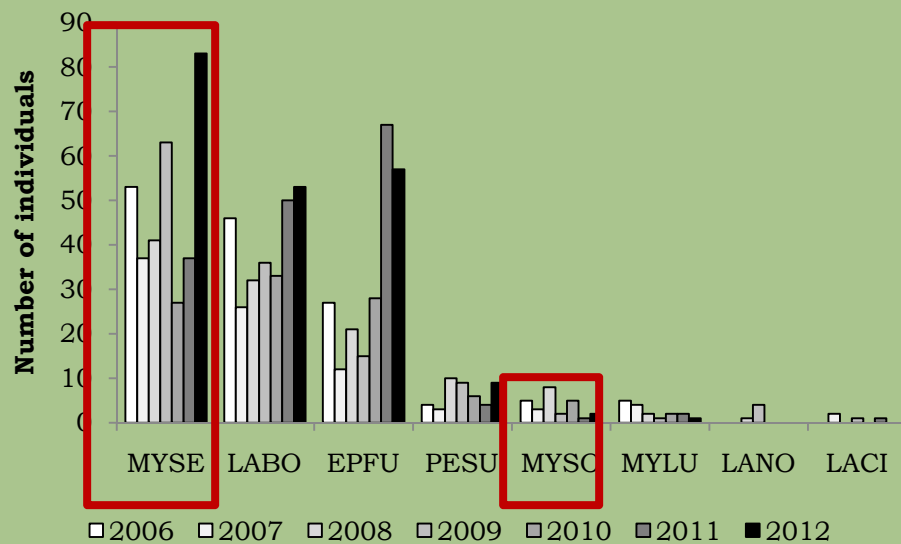
J. O'Keefe, Indiana State University and T. Carter, Ball State University



T. Carter, Ball State University

Studies

- Acoustics, mist-netting and radio-telemetry
- Northern long-eared bat (MYSE) most common on HEE sites
- Endangered Indiana bat (MYSO) present but uncommon



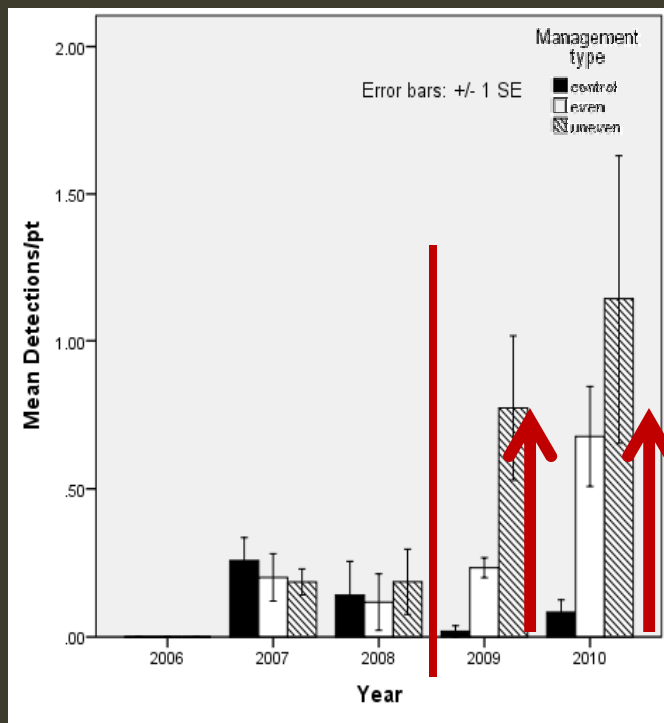
Source: Sheets et al. 2013, HEE Annual Reports 2010-13

Landscape vs. Stand

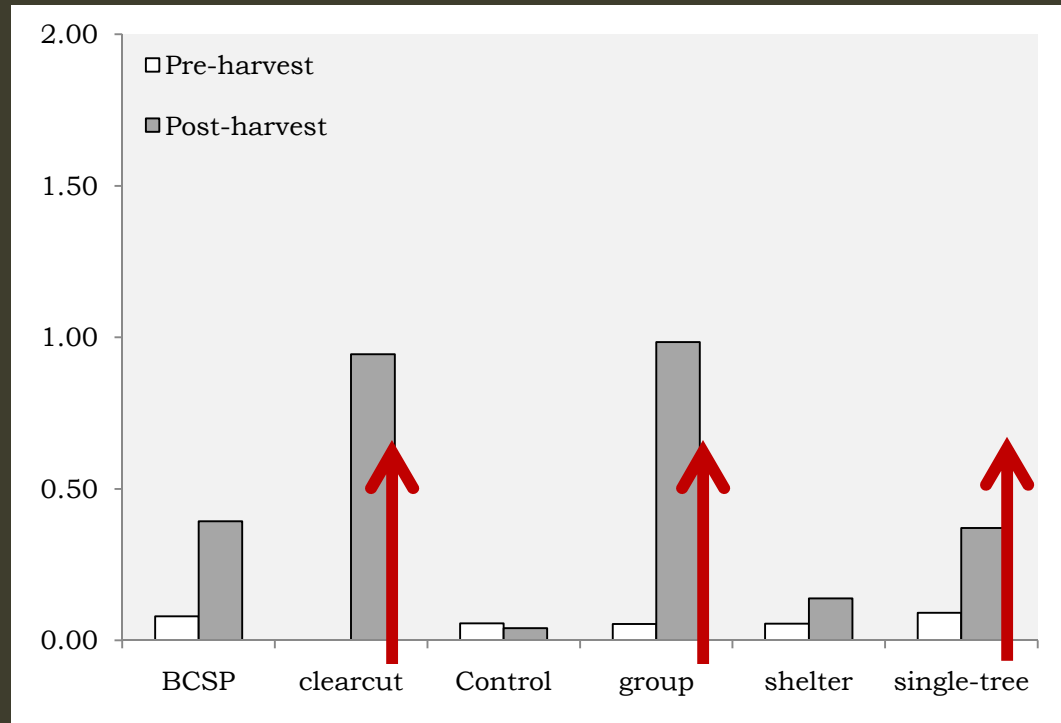
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Case Study: Eastern Towhee

Landscape



Stand

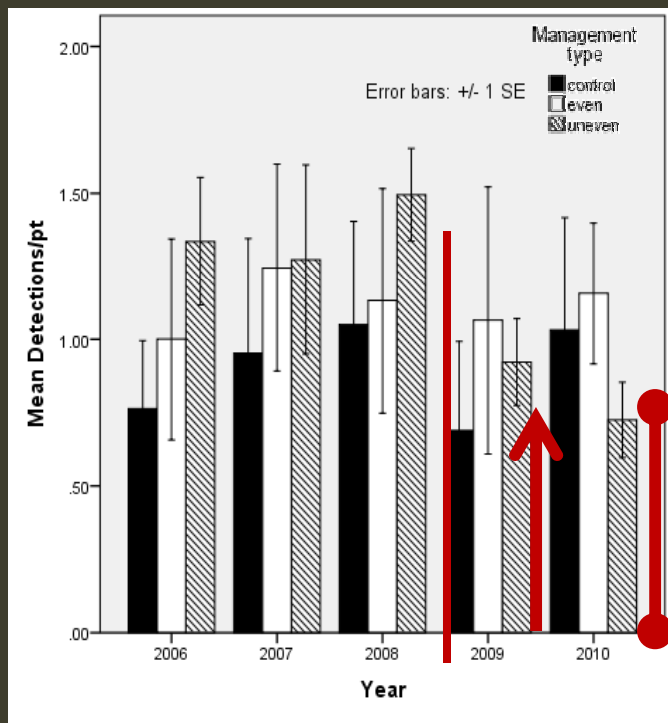


Landscape vs. Stand

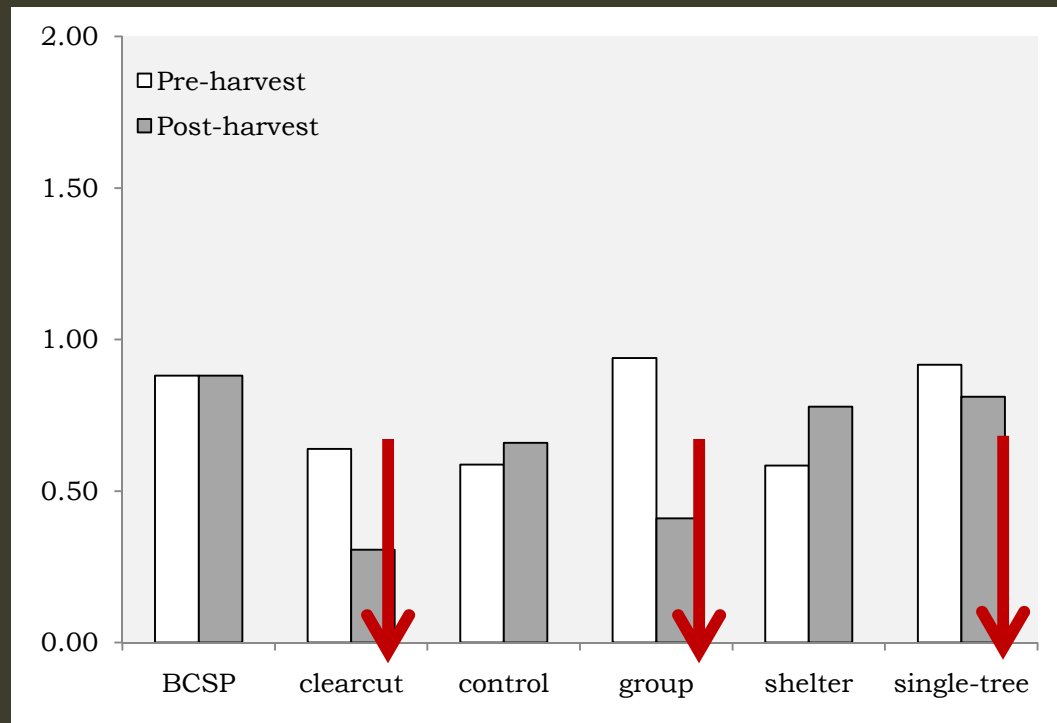
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Case study: Ovenbirds

Landscape

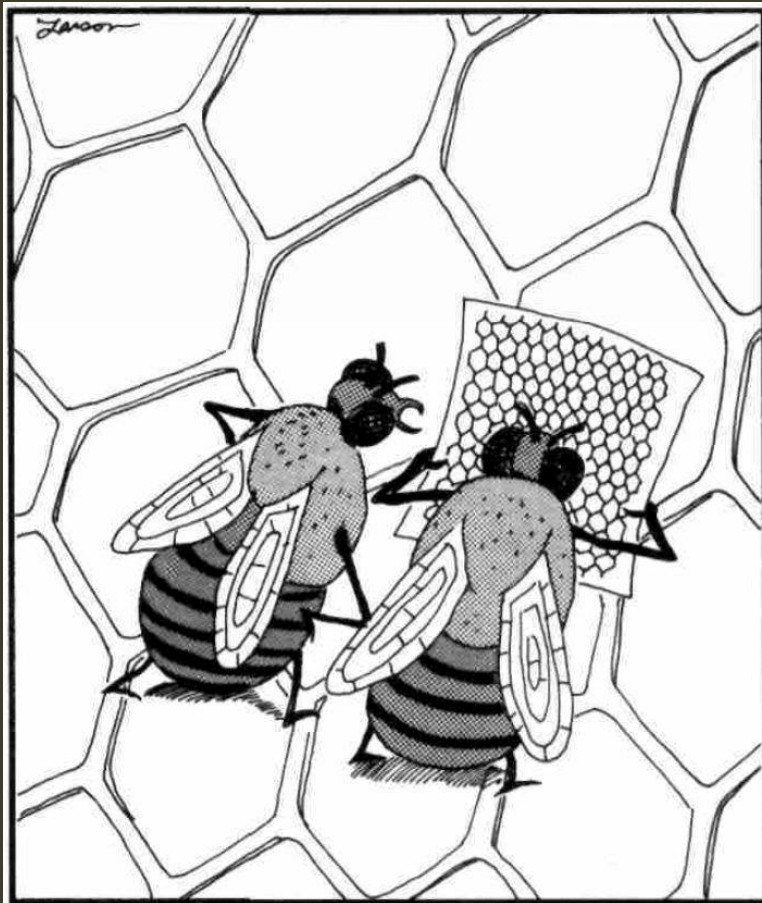


Stand



Why the next 92 years are important

54



"Face it, Fred — you're lost!"

- Responses that appear negative at the stand level or in the short-term often are neutral (and sometimes positive) at the landscape level or over the long term
- Many existing studies have quantified stand level responses to forest management in time windows of 5-10 years
- Gaining an understanding on the HEE of changes across the landscape over time will provide novel insights guiding the management of populations

Some HEE Publications

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COMMUNITY AND ECOSYSTEM ECOLOGY

Spatial Structure of Forest Lepidopteran Communities in Oak Hickory Forests of Indiana

KEITH S. SUMMERVILLE,^{1,2} MIRANDA M. DUPONT,¹ ANDREW V. JOHNSON,³
AND ROBB L. KREHBIEL¹

Environ. Entomol. 37(5): 1224–1230 (2008)

ABSTRACT. The response of forest insect communities to disturbances such as timber harvest will
Ecological Applications, 21(3), 2011, pp. 806–816
© 2011 by the Ecological Society of America

Managing the forest for more than the trees: effects of experimental timber harvest on forest Lepidoptera

KEITH S. SUMMERVILLE¹

Department of Environmental Science and Policy, Drake University, Des Moines, Iowa 50311-4505 USA

Abstract. Studies of the effects of timber harvest on forest insect communities have rarely
Landscape Ecol. (2010) 25:1349–1362
DOI 10.1007/s10980-010-9499-5

RESEARCH ARTICLE

Isolating spatial effects on beta diversity to inform forest landscape planning

Jeffrey D. Holland

Received: 29 March 2009 / Accepted: 11 June 2010 / Published online: 26 June 2010
© Springer Science+Business Media B.V. 2010

Abstract Understanding the effects of landscapes on pest and non-pest species is necessary if regional landscape planning is to both control pests and conserve biodiversity. A first step is understanding of how both pests and non-pest species interact with the landscape configuration to determine the density of the two groups. While it is impossible to examine the occurrence and dispersal behavior of all species, different turnover rates in different species assemblages may offer general insights into responses of species assemblages. In this study I examine the distance decay of similarity of longhorned beetle assemblages in a large forest area in Indiana, USA, with minimal differences in habitat and few barriers to dispersal. Differences in beta diversity between groups are therefore likely due to dispersal distances. I found differences in turnover rates between species that decompose dead wood and those that attack

Keywords Beta diversity · Biodiversity · Cerambycidae · Conservation · Distance decay · Forested landscapes · Management · Pest species

Introduction

Conservation of the biodiversity of beneficial or benign species may depend on encouraging such species in managed landscapes (Banks 2004). At the same time, economic losses from pest species must be considered as these will often trump conservation efforts. It would be ideal to have land use guided by information on how to encourage beneficial native biodiversity while at the same time limiting losses to pest species. Longhorned beetles (Coleoptera: Cerambycidae) are an ideal taxon for studying the

Ecological Indicators 15 (2012) 188–197

Contents lists available at SciVerse ScienceDirect

Ecological Indicators

Journal homepage: www.elsevier.com/locate/ecolind

Improving selection of indicator species when detection is imperfect

Natasha A. Urban, Robert K. Swihart*, Melissa C. Malloy, John B. Dunning Jr.

Department of Forestry and Natural Resources, Purdue University, West Lafayette, IN 47907, USA

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CERULEAN WARBLER (*SETOPHAGA CERULEA*) RESPONSE TO CHANGES IN FOREST STRUCTURE IN INDIANA

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Effects of Forest Treatments on Abundance and Spatial Characteristics of Cerulean Warbler Territories

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ABSTRACT.—We examined effects of forest treatments on Cerulean Warbler relative abundance and spatial attributes of territories between pretreatment (2007–2008) and post treatment (2009–2010) years in Yellowwood and Morgan-Monroe state forests in southern Indiana. Three management units received uneven aged harvests (patch cuts), three units received even aged harvests (shelterwood and clearcut), and three units received no treatment (control). Cerulean Warblers occurred in greater abundance at study sites that received even aged harvests than in uneven aged harvested stands based on point - count surveys. Cerulean Warblers were attracted to areas with large canopy gaps resulting from even-aged harvests. Territory sizes were not significantly smaller after harvest treatments. Cerulean Warbler territories on harvested and control sites were clustered, closer to roads and streams, and on steeper slopes with an eastern aspect compared to random sites. Our relative abundance estimates suggested that Cerulean Warblers responded positively to some types of forest treatments during the 2 y post harvest period.

INTRODUCTION

Cerulean Warblers (*Setophaga cerulea*) are migratory passerines with a breeding range that extends across the midwestern and eastern deciduous forests of the United States and parts of southern Ontario and Quebec, Canada. In South America, they winter on the eastern slopes of the northern Andes Mountains at middle and lower elevations (500–1500 m) from Colombia to Peru and regions of Venezuela (Robbins *et al.*, 1992; Hamel, 2000). An annual

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A Survival Estimate of Midwestern Adult Eastern Box Turtles Using Radiotelemetry

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Short-Term Forest Management Effects on a Long-Lived Ectotherm

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Abstract

Timber harvesting has been shown to have both positive and negative effects on forest dwelling species. We examined the immediate effects of timber harvests (clearcuts and group selection openings) on ectotherm behavior, using the eastern box turtle as a model. We monitored the movement and thermal ecology of 50 adult box turtles using radiotelemetry from May–October for two years prior to, and two years following scheduled timber harvests in the Central Hardwoods Region of the U.S. Annual home ranges (7.45 ha, 100% MCP) did not differ in any year or in response to timber harvests, but were 33% larger than previous estimates (range 0.47–187.67 ha). Distance of daily movements decreased post-harvest (from 22 m ± 1.2 m to 15 m ± 0.9 m) whereas thermal optima increased (from 23 ± 1°C to 25 ± 1°C). Microclimatic conditions varied by habitat type, but monthly average temperatures were warmer in harvested areas by as much as 13°C. Animals that used harvest openings were exposed to extreme monthly average temperatures (–40°C). As a result, the animals made shorter and more frequent movements in and out of the harvest areas while maintaining 9% higher body temperatures. This experimental design coupled with radiotelemetry and behavioral observation of a wild ectotherm population prior to and in response to anthropogenic habitat alteration is the first of its kind. Our results indicate that even in a relatively contiguous forested landscape with small-scale timber harvests, there are local effects on the thermal ecology of ectotherms. Ultimately, the results of this research can benefit the conservation and management of temperature-dependent species by informing effects of timber management across landscapes amid changing climates.

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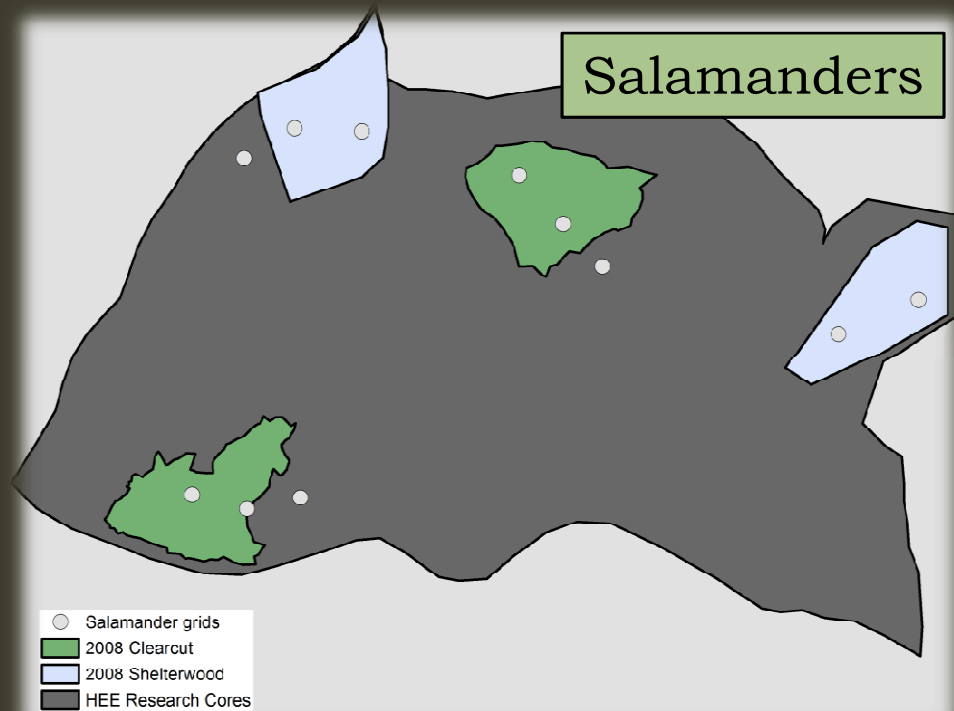
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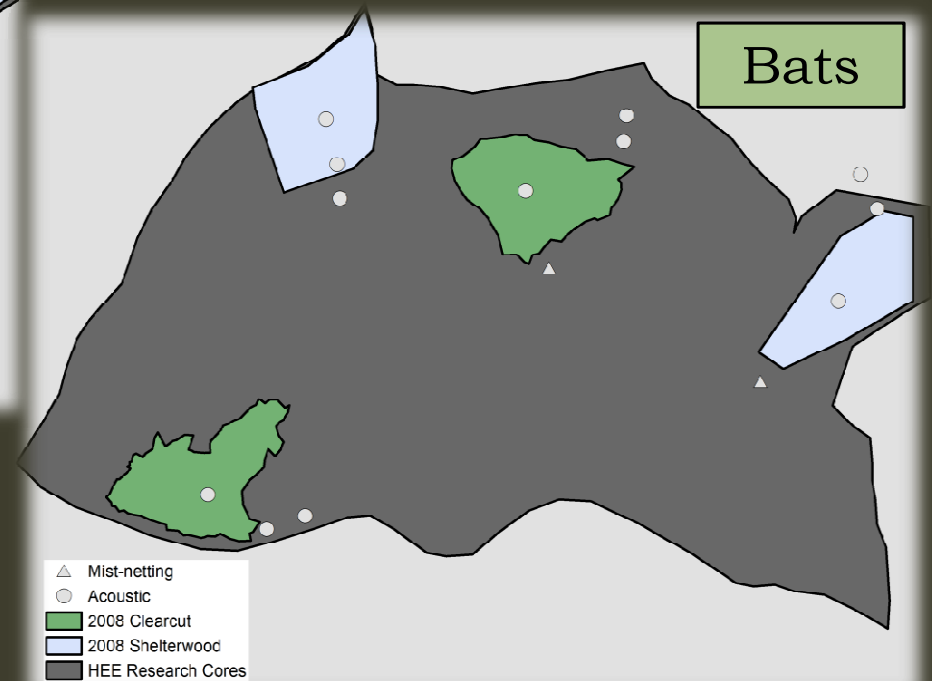
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